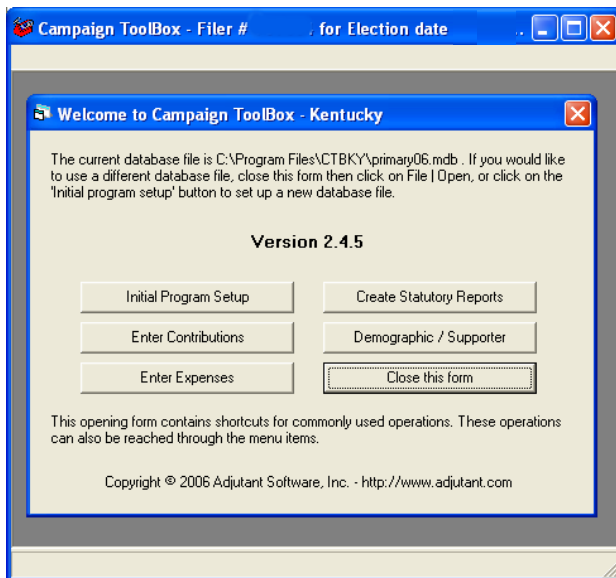
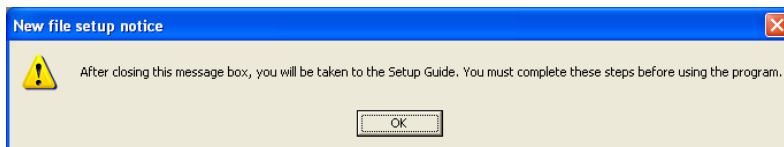


## Initial Program Setup

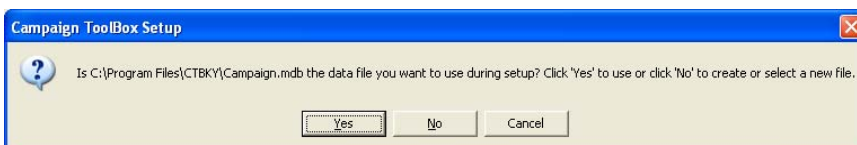
In this document you will find small sample pictures representing the screens you will see during Initial Program Setup. These pictures are provided only as a guide to help you navigate through the setup. A short explanation of each screen has also been provided. In this series of examples, we will be entering Initial Program Setup information for a non-statewide candidate.



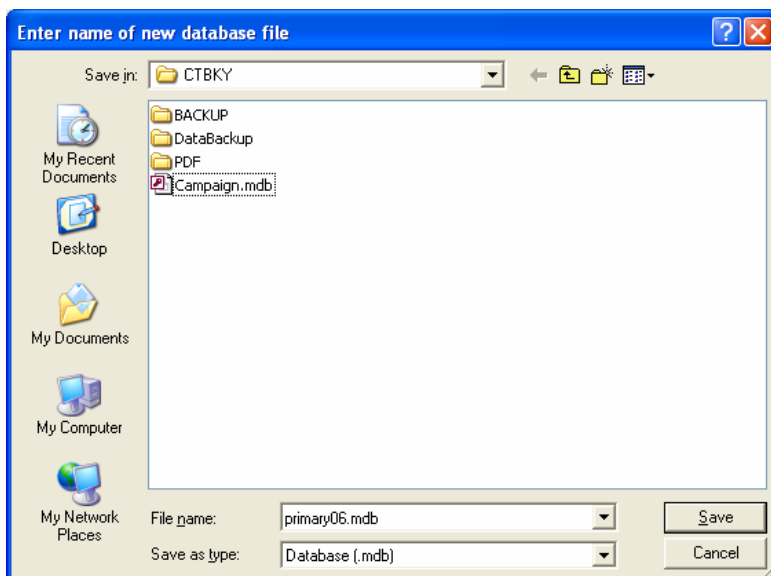
This screen is the “Opening Form”.



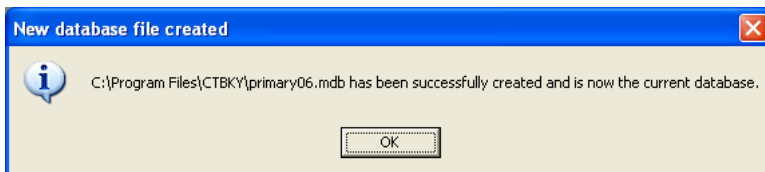
If you are installing the software for the first time, you may see this text box which tells you will be taken to the Setup Guide.



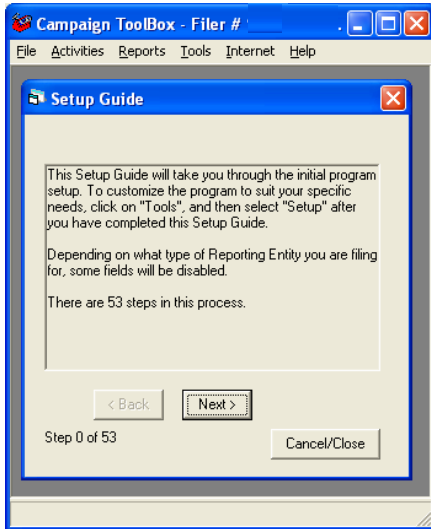
This box asks the user if they want to use the default database name. “Campaign.mdb” is the default database name. We suggest you click on “no” and create a file with a name that is meaningful to the campaign such as “primary06.mdb”.



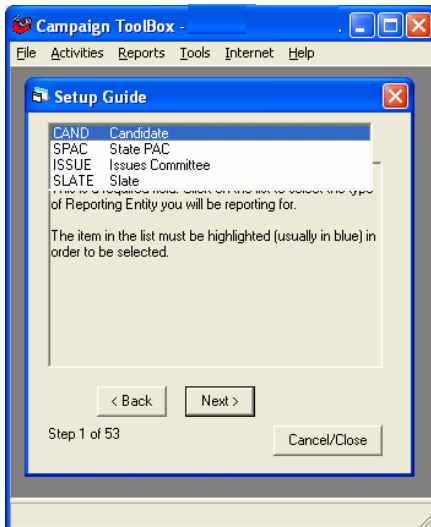
This screen is where you assign a name to your database file.



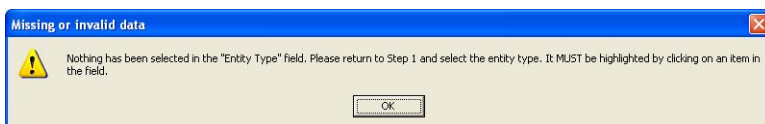
After you have assigned a name for your data file, and you click on "Save", you should see his message stating your file has been created.



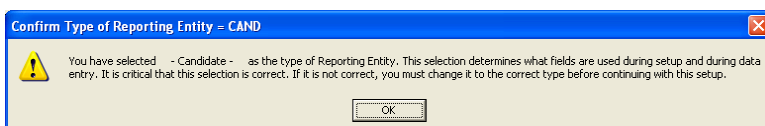
This is the first step of Initial Program setup.



This step is where you choose your reporting entity type. Remember, if you are reporting for a candidate or a candidate's committee that is NOT running for Governor/Lt. Governor, you should choose "Candidate" from the drop-down box.



If your choice was not "locked in", you should see this message stating nothing has been selected from this field.



Once you have selected, you will be asked to verify that your selection is correct.

In step 2 of 53, you will enter the name of the office you are seeking. We will assume for this series of examples that the candidate is NOT seeking a statewide office.

In step 3 of 53, you must designate if you are running in a statewide race. Unless you are running for Governor, Lt. Governor, or any of the Constitutional Officer positions, your answer is "N". This step also determines which of the rest of the 53 steps you will need to enter data into.

Step 4 of 53 is not needed if this setup is for a non-statewide candidate.

Step 5 of 53 – The Reporting Entity is on the email from Adjutant Software which you will get after you have submitted the Registration Agreement.  
If you are trying out the software, please follow the instructions for the TRIAL MODE.

Step 6 of 53 is not needed if this setup is for a non-statewide candidate.

In step 7 of 53, enter the Candidate Name Prefix if you wish. This information is optional.

Enter the Candidate's first name in step 8 of 53.

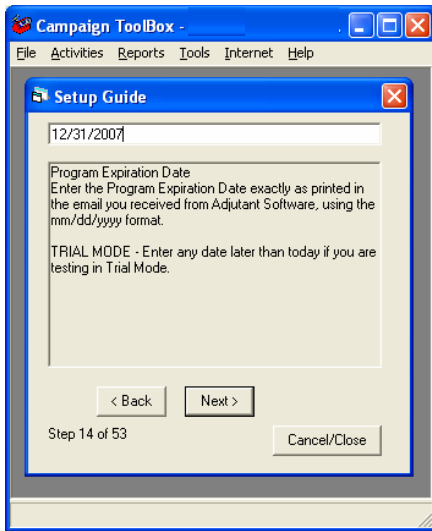
In step 9 of 53, you may enter the Candidate's middle name. This field is optional.

In step 10 of 53, you will enter the Candidate's last name.

Step 11 of 53 is optional. You may enter the Candidate Name Suffix if you wish.

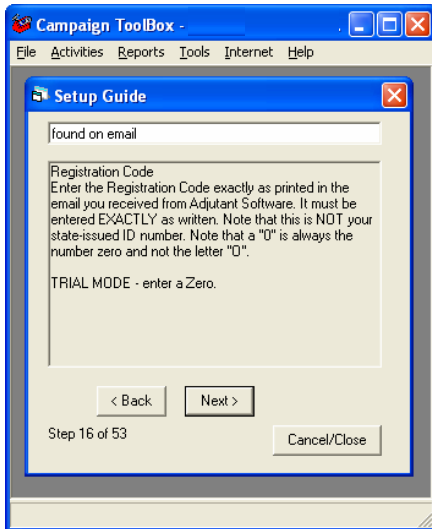
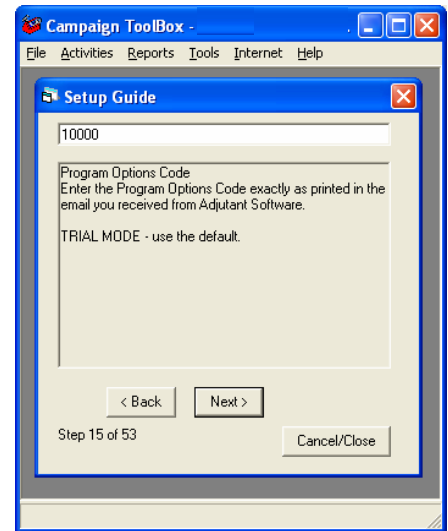
Enter the Candidate's Date of Birth in step 12 of 53,

Step 13 of 52 requires the election date. If this date is not correctly entered, your data file cannot be processed. Please check the KREF website for election dates.



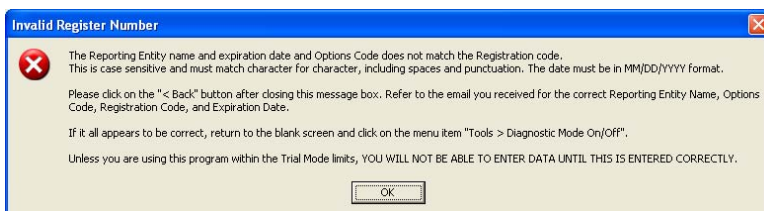
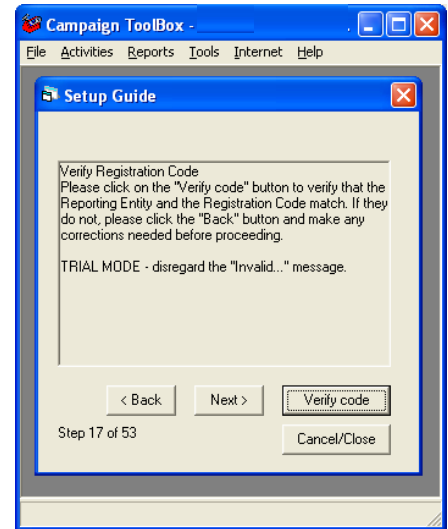
Step 14 of 53 – The Program Expiration Date is on the email from Adjutant Software. If you are trying out the software, please follow the instructions for the TRIAL MODE.

The Program Options Code to be entered in step 15 of 53 will be found in the email from Adjutant Software. If you are trying out the software, please follow the instructions for the TRIAL MODE.

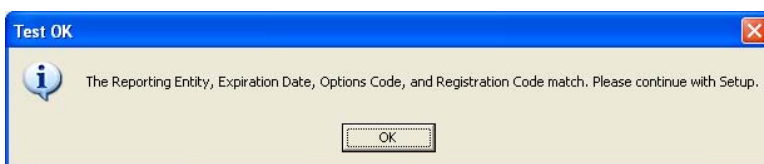


Step 16 of 53 – The Registration Code is on the email from Adjutant Software. If you are trying out the software, please follow the instructions for the TRIAL MODE.

In step 17 of 53, you should click on the “Verify Code” button. You should get one of the two following message boxes. If you are trying out the software, please follow the instructions for the TRIAL MODE.



If you get this message box after clicking on the “Verify Code” button, one of the fields mentioned in the message may have been entered incorrectly. If you cannot get the next message box on your screen after reentering the information, call the Registry for assistance.



Once you see this message box, press the “OK” button and proceed to the next step.

Step 18 of 53 is for the candidate's mailing address. This field is required.

Step 19 of 53 is not required. In this field, you may enter an additional line of address.

Step 20 of 53 requires the candidate's city for the candidate's mailing address.

Step 21 of 53 defaults to "KY". The candidate's state is required for mailing information.

Enter the candidate's zip code in step 22 of 53.

In step 23 of 53, you must enter the candidate's Filer Number. This number is sent in the email you will receive from the Registry.

If you are trying out the software, please follow the instructions for the TRIAL MODE.

Step 24 of 53, you must enter the candidate's Candidate Number. You will find this number in the email you will receive from the Registry.

If you are trying out the software, please follow the instructions for the TRIAL MODE.

In step 25 of 53, you must enter the candidate's county of residence. The County Clerk in this county will get a copy of the hard copy report that you submit to the Registry in addition to the electronic file.

Step 26 of 53 asks for the candidate's political party. If your candidate is seeking a non-partisan office, enter "Non-Partisan" in this field.

You must provide the name of the person who will most often sign the hard copy of the financial report. Step 27 of 53 is required.

Enter the treasurer's full name in step 28 of 53.

Step 29 of 53 is for the treasurer's mailing address. This field is required.

Step 30 of 53 is for an additional line of the treasurer's mailing address. This field is not required.

Step 31 of 53 requires the treasurer's city for the treasurer's mailing address.

Step 32 of 53 defaults to "KY". The treasurer's state is required for mailing information.

Enter the candidate's zip code in step 33 of 53.

Step 34 of 53 requires a phone number where the treasurer may be reached. This information is required.

Enter an email address where we may contact an official representative of the campaign in step 35 of 53.



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Based on your previous entries, this field is not used. Leave this field blank and click the "Next" button.

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Step 36 of 53 Cancel/Close

Steps 36 through 42 of 53 are not required information for non-statewide candidates.

Step 43 of 53 asks for the candidate's phone number.

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606-270-8955

Custodian or Candidate Phone - Max. field size = 20  
This is an optional field. Enter the Custodian (if filing for a PAC) or Candidate (if filing for a candidate) area code and phone number using the 999-999-9999 format.

< Back Next >

Step 43 of 53 Cancel/Close

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Based on your previous entries, this field is not used. Leave this field blank and click the "Next" button.

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Step 44 of 53 Cancel/Close

Steps 44 through 50 of 53 are not required information for non-statewide candidates.

Step 51 of 53 requires the campaign start date. This date must be at least one day earlier than any of the transactions entered into the database for financial reporting.

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11/11/2005

Campaign Start Date - Max. field size = 10  
Enter any date on or before your first record to be reported. This date is used to tell the program to ignore all records prior to this date.  
This date should always be earlier than ANY records in this database file that should be reported.  
PACs should use a date like 01/01/1990.  
Use mm/dd/yyyy format for the date.

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Step 51 of 53 Cancel/Close

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KY

Default State - Max. field size = 2  
This is a required field. Enter the State using the standard 2-letter code. This will appear as the default value in the state field when you are entering new records.

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Step 52 of 53 Cancel/Close

Step 52 of 53 defaults to "KY". This will be the default in the data entry section so you will not have to continually enter it.

Step 53 of 53 - Click on the "Cancel/Close" button to exit the form. Your setup is now completed.

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End of Initial Program Setup  
You have now gone through each of the steps in setting up Campaign ToolBox for this Reporting Entity. You can go back and make changes at any time either by going through this same process or by clicking on Tools | Setup.  
Click on the Cancel/Close button to exit this form.

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Step 53 of 53 Cancel/Close